



***New!* Using ARIES to Track Outreach Services**

Ask ten people to define "Outreach" and you'll get ten different answers, but simply put, Outreach is about getting clients into care. The R27 version of ARIES includes several new features to help you and your staff track and manage Outreach Services, including the ability to record encounters for "anonymous" clients. State-funded Minority AIDS Initiative (MAI) providers, as well as Ryan White providers who fund Outreach Services and/or Early Intervention Services, may find these new features to be very helpful.

Outreach Clients

Clients in need of Outreach Services may fall into one of three categories: 1) HIV-positive persons who have fallen out of care; 2) newly-diagnosed persons who have never been in care; and 3) persons at high risk for HIV infection whose status is unknown.

Clients in need of Outreach Services may already be enrolled in ARIES. These could be clients who have become lost to follow-up and need the special attention of an Outreach Worker. By virtue of being enrolled in ARIES, these clients are *known* clients, but Outreach Services are often provided to *anonymous* clients. Such clients may be known to the Outreach Worker, but they are "anonymous" in the sense that they have not provided a full set of client identifiers, nor have they signed an ARIES Consent Form, and therefore cannot be enrolled in ARIES in the usual way.

It should also be noted that some clients in need of Outreach Services may be *former* ARIES clients. They may have been engaged in care at some point, fallen out of care, and may be known to the Outreach Worker, but the Outreach Worker may have no idea that the client was ever enrolled in ARIES.

Collecting data on anonymous clients has both practical and legal challenges. It may be difficult to get complete and accurate data, especially identifiers, and obtaining an ARIES Consent Form may be a barrier to continued Outreach. Without consent, very limited data can be collected without specifically identifying the client. The new ARIES Outreach Services Module allows you to do collect the data you need while preserving patient confidentiality.

INSIDE THIS ISSUE

<i>New!</i> Using ARIES to Track Outreach Services	1
Document Upload	12
Other Highlights	13
New Windows Browser is an Unknown for ARIES	13
What's Coming?	14

The features of the module may be thought of as two sides to the same coin -- one side is for *known* ARIES clients, and the other for *anonymous client encounters* (ACE for short). New data entry screens have been designed just for Outreach, including a "dashboard" that can serve as a home screen for Outreach Workers. New staff permissions have also been added so that access to Outreach data can be limited and controlled.

The Dashboard

The screen below shows the new dashboard available to Outreach Workers (all names are fictitious). This can become the home page for an Outreach Worker, so that upon logging into ARIES, this screen appears immediately. The dashboard shows both sides of the outreach coin, with ACE clients (anonymous clients) in the top list and ARIES clients (known clients) in the bottom list. By default, the screen shows only the active caseload for the Outreach Worker. These are clients who have entered into Outreach Services but whose outcome is still pending. Using the many filter options above each list, you may expand or narrow the list. You may also click on any column heading to sort the list by that data element. ARIES remembers your filter and sort choices, and each time you return to the dashboard, the parameters will be the same. While this screen is designed for Outreach Workers, agency staff who manage Outreach Workers may also want access to this screen to monitor the status of any Outreach Worker's caseload.

ACE Worker Dashboard

ACE

Referral Date and Outcome Date Is Null and

Last Service and Outcome

Staff Worker, Outreach 3

ACE ID	Date Referred to Outreach	Date of Last Service	Outcome Date	Outcome	Staff
A00013	4/6/2015	4/6/2015			Worker, Outreach 3
A00033	4/6/2015				Worker, Outreach 3
A000K0	4/13/2015				Worker, Outreach 3

ARIES

Referral Date and Outcome Date Is Null and

Last Service and Outcome

Staff Worker, Outreach 3

Name	ARIES ID	Date Referred to Outreach	Date of Last Service	Outcome Date	Outcome	Staff
Bush, Rose X	100048651	4/6/2015	4/13/2015			Worker, Outreach 3
Pen, Red X	100048701	4/7/2015				Worker, Outreach 3
Pen, Red X	100048701	4/13/2015				Worker, Outreach 3

The "ticket" for entry into Outreach Services Module is a Referral record. Initially, as with all Referrals, the Outcome and Outcome Date are blank (null). This is how the active caseload is identified; by default, the dashboard will display *Is Null* Outcome Dates. When a case is successfully or unsuccessfully resolved, an Outcome and Outcome Date should be entered into the Referral record to close the case.

For ACE clients, the Referral record is created automatically when you enroll the client. For ARIES clients, the Referral is entered manually, and only certain types of Referrals qualify as a valid "ticket" into Outreach Services Module.

Adding a New ACE Client

Date of Initial Contact	*	<input type="text" value="4/6/2015"/>	
County of Residence	*	<input type="text" value="Los Angeles"/>	
Hispanic		<input type="checkbox"/>	
Nat'l Orig/Ethnic.		<input type="text"/>	
Race		<input type="text"/>	
Date of Birth		<input type="text"/>	
Current Gender		<input type="text"/>	
Staff		<input type="text" value="Worker, Outreach 3"/>	

To add a new ACE client, the process is similar to enrolling an ARIES client. You start by searching for an existing ACE client, and if no match is found, you then have the option to create a new ACE client. When you select that option, the screen above appears. Only two fields are required: Date of Initial Contact, and County of Residence. If other demographic data is available, it may be entered now, or entered later. To assign the ACE client to a particular Outreach Worker, use the Staff dropdown. Only staff in the new Outreach Worker user group will be listed in this dropdown (more on this later!).

There are no fields for client name; since ACE clients do not sign an ARIES Consent Form, they must remain anonymous. Not only are there no name fields on this screen, **but you must be careful not to enter any names or other identifying information on any other ACE screens.** Doing so is a violation of State Office of AIDS confidentiality policy. When you save the record, ARIES will assign a random ACE ID to the client -- a six-character identifier, starting with the letter "A" and containing random letters and numbers. It is then up to the Outreach Worker to manually cross-reference this ACE ID to the matching client by externally tracking which ID belongs to which client.

Editing an ACE Client Record

Editing an ACE client record is much like editing an ARIES client record, only with far fewer data elements. If the desired ACE client is shown on the Dashboard, you may edit the client by simply clicking on the ACE ID of the client. If you are not at the Dashboard, or cannot find the ACE client on your Dashboard, you may search for the client using a wide variety of criteria: ACE ID, Race, Gender, Date of Birth, County, Encounter Date, Outcome Date, Outcome, or Staff. On the Search Results screen, click on the ACE ID of the desired client to edit that record.

DEMO-GRAPHICS	SERVICES	HIV TESTS	REFERRALS
Demographics			
ACE ID: A00013 Edit			
Date of Initial Contact: 4/6/2015			
Current Gender: Male			
Date of Birth: 9/9/1989			
Hispanic: Yes			
Nat'l Orig/Ethnic.: Mexican/Mexican-American			
Race: 1) Other			
County of Residence: Kern			
Staff: Outreach 3 Worker			

The read-only screen for an ACE client is shown above. Note that it consists of only four tabs: Demographics, Services, HIV Tests, and Referrals. The Demographics tab is an abbreviated version of the regular ARIES client screen, and contains only the data elements shown above. When editing this screen, you may move an ACE client from one Outreach Worker's caseload to another by changing the Staff field. If you leave the Staff field blank for an ACE client, that client will appear on the Dashboard of *all* Outreach Workers. If your agency has multiple Outreach Workers who work collaboratively as a team to manage clients, placing an ACE client on all the Dashboards can be very useful since all of the Outreach Workers will be able to easily see the status of all clients at any time. If, on the other hand, each of your Outreach Workers handles a separate and distinct caseload, assigning an ACE client to one staff person may make more sense. Changing staff assignments can also be useful when an Outreach Worker is out of the office for an extended period.

The HIV Tests tab is a mini-version of the regular ARIES Medical History tab, and contains only one table, HIV Tests. This tab in the Outreach Services Module will be used primarily by Ryan White Part A and B providers who are funded to conduct HIV testing through the primary service called Early Intervention Services. Such providers should track *all positive test results* on this tab for their anonymous clients.

The Referral tab is identical to the regular ARIES tab. Here you will see the Referral that was created automatically when you first enrolled an ACE client. Think of this as the client's "ticket" into the Outreach Services Module. ***Close this Referral (by entering an Outcome and Outcome Date) only when you wish to close this ACE client's case.*** As long as you are still providing services to this client, or in any way actively reaching out to the client, or even simply monitoring the client, keep the Referral open. You may also enter additional Referrals if you are able to refer the ACE client to some other source for a specific need. For example, as a part of your outreach to the client, you may refer a homeless client to a housing program at your agency or at another agency. Enter a Referral to track the progress and outcome of your efforts to provide stable housing to the ACE client.

Entering Services

Every time you do something on the client's behalf, whether or not it involves direct contact with the client, enter a Service Line Item using the Services tab. This tab is identical to the regular ARIES tab. The Service screen is now sortable by clicking on any of the column headers. While the function and appearance of the screen is identical, one important difference is the *content* of this screen. Some programs have guidelines around whether anonymous clients can be served and what services they may receive. For that reason, ARIES shows only certain contracts on the Service data entry screen for ACE clients, and within those contracts, only certain services will be available in the Primary, Secondary, and Subservice dropdowns.

Two factors determine whether or not a particular type of Service appears in the dropdowns for an ACE client. The first is a "flag" on the Contract setup screen called "Is ACE/MAI Contract." Only contracts that have this box checked will be listed in the Contract dropdown for ACE services. If you do not set up your own Contracts (most provider agencies don't), contact your Grantee to ensure that the appropriate contracts are marked as Outreach related. For those Contracts, the second factor determining dropdown content is the ARIES Service Hierarchy. Only those types of services that are appropriate for Outreach will be listed. The Resources Page at www.projectaries.org contains a downloadable copy of the ARIES Service Hierarchy in Microsoft Excel format. Only those rows where you see "True" in the isAceMaiService column will be available on the Service data entry page for ACE clients. When setting up contracts, Administrative Agencies should adhere to the contract naming conventions outlined in [ARIES Policy Notice D1](#).

Referring Full (Known) ARIES Clients for Outreach

So far, we've looked at Outreach Services from the perspective of managing an anonymous ACE client. Now let's look at how a known ARIES client enters Outreach Services.

Pretty X Flower Referral

Referral Date	<input type="text" value="6/12/2015"/>	Outcome Date	<input type="text"/>
Referred By	<input type="text" value="Ranck, Dave"/>	Outcome	<input type="text"/>
Program	<input type="text" value="Ryan White"/>	Notes	<div style="border: 1px solid gray; height: 80px;"></div>
Primary Service	<input type="text" value="Outreach Services"/>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">Only certain types of Referrals qualify as a "ticket" into Outreach Services</div>	
Secondary Service	<input type="text" value="Outreach Services"/>		
Referral Type	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">Refer To Agency must be <u>your</u> agency</div>	
Referral Type (other)	<input type="text"/>		
Refer To Agency	<input type="text" value="Data Design & Development"/>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">Only staff in the Outreach Worker user group will be listed here</div>	
Refer To Staff	<input type="text" value="Worker, Outreach 3"/>		
Target Date	<input type="text" value="6/12/2015"/>		
Follow-Up Date	<input type="text"/>		
Reason	<input type="text" value="Client has missed the last several appointments and could not be reached by phone."/>		

The screen above shows a Referral being entered for a full ARIES client. Referrals are entered on the Referral subtab of the Care Plan tab. In this example, a client has missed several appointments and cannot be contacted (see Reason field). The client needs to be referred to an Outreach Worker for special follow-up. To qualify as a "ticket" into the Outreach Services Module, a Referral must meet the following criteria:

- **The Program, Primary Service, and Secondary service that define the Referral must be from a specified list that identifies Outreach Services.** You can review this list by looking at the ARIES Needs Assessment Configuration file. The Resources Page at www.projectaries.org contains a downloadable copy of this file in Microsoft Excel format. Only those rows where you see "True" in the isAceMaiReferral column qualify. Currently, the Primary services "Early Intervention Services (Parts A and B)" and "Outreach Services" under the Ryan White program, and any service under State-funded Minority AIDS Initiative (MAI) qualify.
- **The Refer To Agency must be your agency.** The Refer To Agency field is a recent addition to the Referral screen. This field lets you identify the agency to which you referred a client -- either another ARIES agency, your agency, or an agency that does not use ARIES. Each agency may customize the dropdown list for Refer To Agency to meet their own unique needs. Initially, this dropdown will be empty, so you must use a task on the Agency Utilities tab to add your own agency to this list *before* you will be able to refer an ARIES client into Outreach Services. Generally, only agency management staff have permission to access the Agency Utilities tab and customize the dropdown. For more information, see the [November 2014 ARIES Advisor](#). The ARIES Help Desk can also help you with this task. Contact them at 866-411-ARIES (2743).
- **The Refer To Staff must be entered.** This field is new. *This field does not appear on the Referral screen until you have selected qualifying Program, Primary, and Secondary values, and selected your agency for the Refer To Agency field.* When the field does appear, it will contain only staff at your agency who are in the Outreach Worker user group (more on this later). By making a selection in this field, you are adding the ARIES client to the caseload of that particular Outreach Worker.

If you enter a Referral that meets the three criteria above, the ARIES client will now be shown on the Dashboard of the Outreach Worker you identified in the Refer To Staff field. Once on the Dashboard, editing an ARIES client through Outreach Services is identical to editing a regular ARIES client -- you may search for the client, as usual, and you will see the same tabbed client screens when reviewing or editing the client's data. Placing an ARIES client into Outreach Services does *not* prevent other users from locating the client or reviewing, entering, or editing data for the client. It only brings the ARIES client to the attention of the Outreach Worker so the client can receive the special services needed to return to care. While ACE clients may only receive certain types of services in Outreach Services, ARIES clients may receive *any* service. As with ACE clients, the manually entered Referral record serves to track the client's status within Outreach Services, and as such, should not be closed until you wish to close the client's case. But, just as with ACE clients, the Outreach Worker may enter *additional* Referrals for an ARIES client to track referrals for other types of services.

Documenting Linkage to Care

Eventually, you will want to close an Outreach client's case. While the ultimate goal of Outreach is getting the client into care, that doesn't always happen. If you have exhausted all your efforts on behalf of the client, you will want to close the case. Similarly, if you were able to get the client into care, you will also want to close the case. To do so, edit the Referral that was the client's "ticket" into Outreach Services.

Pretty X Flower Referral

<p>Referral Date <input type="text" value="6/12/2015"/> <input type="button" value="Calendar"/></p> <p>Referred By <input type="text" value="Ranck, Dave"/> <input type="button" value="Dropdown"/></p> <p>Program <input type="text" value="Ryan White"/> <input type="button" value="Dropdown"/></p> <p>Primary Service <input type="text" value="Outreach Services"/> <input type="button" value="Dropdown"/></p> <p>Secondary Service <input type="text" value="Outreach Services"/> <input type="button" value="Dropdown"/></p> <p>Referral Type <input type="text" value=""/> <input type="button" value="Dropdown"/></p> <p>Referral Type (other) <input type="text" value=""/></p> <p>Refer To Agency <input type="text" value="Data Design & Development"/> <input type="button" value="Dropdown"/></p> <p>Refer To Staff <input type="text" value="Worker, Outreach 3"/> <input type="button" value="Dropdown"/></p> <p>Target Date <input type="text" value="6/12/2015"/> <input type="button" value="Calendar"/></p> <p>Follow-Up Date <input type="text" value=""/> <input type="button" value="Calendar"/></p> <p>Reason <input type="text" value="Client has missed the last several appointments and could not be reached by phone."/> <input type="button" value="Dropdown"/></p>	<p>Outcome Date <input type="text" value="6/12/2015"/> <input type="button" value="Calendar"/></p> <p>Outcome <input type="text" value="Referred to Care"/> <input type="button" value="Dropdown"/></p> <p>Notes <input type="text" value=""/></p>
--	---

The screen above shows a Referral being edited. This screen is the same whether editing an ACE (anonymous) client or an ARIES (known) client. To close the case, enter both an Outcome Date and an Outcome on the right side of the screen. The dropdown shows the available options. If you wish, you may add to the Notes field, which is obscured by the dropdown above. ***Do not include any information about substance abuse, mental health, or other sensitive or identifiable data in the Notes field.***

There are two options to document a linkage to "Care." *Referred to Care* means that you referred the client to a care facility but you're not certain if the client kept his medical appointments. *Confirmed to Care* means that you have confirmation from a care facility, probably your own agency, that the client kept her medical appointments. If you close a case using *Referred to Care* and you subsequently receive confirmation that the client kept his medical appointments, you can edit the Referral and change the Outcome. Only certain users have permission to edit Referrals. If you do not, check with your manager. The outcome option *Referred to Prevention Services* may be used for high-risk negatives who you link to behavioral, medication (PrEP), and other prevention services.

Linking an ACE Client to an ARIES Client

The final step in closing a successful Outreach case is perhaps the most important: *establishing a link between an ACE client and an ARIES client*. To illustrate, let's assume you enroll an ACE (anonymous) client into Outreach Services, and after working with the client, you are successfully able to get the client into care. You escort the client to the Intake Worker at your agency, and verify that the client provides the necessary six identifiers, signs the required ARIES Consent Form, and is enrolled into ARIES. At that point, the client will exist in ARIES **twice**: once as an anonymous ACE client, and again as a known ARIES client. More importantly, that client's data will exist in two unrelated sections of ARIES, making it hard to see the big picture. There will be no way to know that the ARIES client came into your agency via Outreach, and the data entered in on the Outreach screens (Services, HIV Tests, Referrals) will not be visible for the ARIES client. Similarly, there will be no way to know the nature of the care that the ACE client received, or whether the ACE client is still engaged in care.

DEMOGRAPHICS | ELIGIBILITY | PROGRAMS | MEDICAL | MEDICATIONS

CONTACT INFO | **DEMOGRAPHIC DETAIL** | LIVING SITUATION | AGENCY SPECIFICS

Laptop X Computer

Identifiers [Edit](#)

Current Gender: Male
Birth date: 1/1/1990 (25 years old)
ARIES ID: 100017136

Demographics [Edit](#)

AKA:
Sex at Birth: Male
SSN:
Hispanic: No
Race: 1) Black
Marital Status:
Sexual Orientation:
Education Level:
Veteran:
Primary language:
Secondary language:
Place of Death:
Special needs:
Notes:

ACE Records [Edit](#)

ACE ID's:

The screen above shows a new "ACE Records" section at the bottom of the Demographic Detail subtab in full ARIES. This feature can be used to link an ARIES client to an ACE client. Linkage requires that you know the ACE ID that was assigned to the client while in Outreach Services. Continuing with the scenario above, when you escort the ACE client to the Intake Worker for ARIES enrollment, you should also provide the Intake Worker with the ACE ID of the client. After enrolling the client in ARIES, the Intake Worker can click on the Edit button in the screen above and enter the ACE ID on the screen below to link the two clients.

Laptop X Computer Link New ACE Record

Enter an ACE ID and click Search to confirm your ACE selection.

ACE ID to link

After entering the ACE ID in the screen above, ARIES will present the screen below. The purpose of this second screen is to give you a moment to compare some data about the ARIES client and the ACE client to confirm that they are the same person.

Laptop X Computer Link New ACE Record

Enter an ACE ID and click Search to confirm your ACE selection.

ACE ID to link

	ACE	ARIES
Date of Birth		1/1/1990
Gender		Male
Race		1) Black
Hispanic Nat'l Orig/Ethnicity		No
County	Los Angeles	Los Angeles

After confirming that the ACE client and the ARIES client are the same person, click Save to link the two clients.

Caution! Be sure you have the correct clients! Linking can only be reversed under certain circumstances, and only within a very narrow window of time. Once you click Save, all of the historical (longitudinal) data from the ACE client (Services, HIV Tests, Referrals) will be added to the ARIES client. Any non-longitudinal data (demographics) will be used to update the ARIES client, assuming that the ACE data is more current than the ARIES data. When the linkage is complete, the screen below will appear, and the ACE ID of the linked client will be shown at the bottom of the Demographics read-only page.

Laptop X Computer ACE Records

ACE ID	Date of Birth	Current Gender	Race	Staff	County	Date Linked
A00033				Worker, Outreach 3	Los Angeles	06/12/2015 05:06 PM

Note that the screen above allows for linking *multiple* ACE clients to the same ARIES client. It is not unusual for a client to fall out of care multiple times, and each time that occurs, the client may receive Outreach Services again, *but may not be known to be a former ARIES client*. The Outreach Worker may begin working with the client as an anonymous client, and eventually get the client into care, and during the ARIES enrollment process (which always involves a search), it may be discovered that the client is already enrolled in ARIES. To accommodate this scenario, the linkage process allows a single ARIES Client record to be linked to multiple ACE client records. However, a given ACE client can only be linked to one ARIES client.

That completes the cycle of Outreach Services: getting a client into Outreach via a Referral, providing services focused on getting the client into care, closing the case, and if there was a successful outcome, enrolling the client into ARIES and linking two clients. The following sections provide additional information on specific functions within Outreach Services:

Administrative Functions: New User Group

A new user group called Outreach Worker has been added to the dropdown on the staff setup screen. Placing a user in this group will give them default permissions for most Outreach tasks, and make the Dashboard their home screen. In addition, only users in this user group will be shown on the Refer to Staff dropdown on the Referral screen, and in the Staff filter dropdown on the Dashboard. If your agency has Outreach Workers who are not yet using ARIES, you can request permission for ARIES access by completing an [ARIES User Registration Form](#). Please note that if you have existing ARIES users and wish to move them into the new Outreach Worker group, a new ARIES User Registration Form is also required (any time a user's group changes, a new form is required).

Permissions for Outreach 3 Worker				
General group or role:		Outreach Worker		
Supplement or override group permissions with checkboxes in the following list.				
Function	View	Change	Create	Deactivate
ACE OUTREACH SERVICES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Full ARIES Client Tabs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outreach Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACE Search	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACE Demographics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACE Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACE Referrals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACE HIV Tests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Link ACE Record	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unlink ACE Record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Administrative Functions: User Permissions

A new set of user permissions has been added specifically for Outreach Services. The screen above shows the permissions as well as the defaults for the new Outreach Worker user group. Note that by default, an Outreach Worker does not have access to the full ARIES client tabs (note unchecked box on second row). This works well for staff who specialize in Outreach, but if your Outreach Workers also perform other ARIES-related tasks, you can give them access to the full ARIES by checking this box. Note that access to the full ARIES client tabs is subject to all the other permissions -- simply checking this box does not grant access to all screens.

Also, please be aware that the Link ACE Record above only grants access to the linking features at the bottom of the Demographics tab. To actually *perform* a link, additional permissions are required. For example, linking may update Demographic data for the ARIES client, and if the user does not have permission to access the Demographic edit screen, the link will not be successful. If you experience errors related to linking clients, contact the ARIES Help Desk at 866-411-ARIES (2743). They can adjust permissions to permit successful linking.

Users other than Outreach Workers may need access to the Outreach screens. For example, an Agency Manager may want to monitor Outreach activities via the Dashboard, or other staff may want to design reports using the new Outreach data (see below). Existing staff can be granted access to Outreach tasks by checking the appropriate boxes above. Expanding an existing user's permissions does not require a new ARIES User Registration Form as long as the User Group is not changed.

Reports

There are no canned reports specific to Outreach Services. However, all of the new tables that contain Outreach data are available in ARIES ReportExport -- those tables are only visible to users who have "View" permission for the main Outreach Services task (see first row of screen above). If you wish to design your own reports related to Outreach, and you already have access to ReportExport, ask your manager to make sure you have this permission. You may also contact the ARIES Help Desk for help with Outreach reports. The Help Desk expects to develop a few basic reports in the near future for general use. Watch for additional information in future editions of the *ARIES Advisor*.

ARIES Help Desk

866-411-ARIES (2743)

helpdesk@projectaries.org

The ARIES Help Desk is open from 8:00 AM to 5:00 PM Monday through Friday, excluding holidays.

Document Upload

Have you ever wanted to attach the HIV diagnosis letter, proof of income, or signed ARIES Consent Form to a client's ARIES record? The Document Upload feature allows users with the proper permissions to do just that!

Document Upload allows users to add a Word (.doc, .docx) or PDF file to client records on the Eligibility Documents subtab and on the new Documents tab. The file size is limited to 2,000 KB (2 MB) per document which is about the size of a three-page document scanned at 150 dpi. If you are scanning a document, resolutions less than 150 dpi may be difficult to view online.

There are two screens where documents can be uploaded to:

Eligibility Documents Subtab

Up to 10 documents can be uploaded on a client's Eligibility Documents subtab. Users can (1) upload a file to a newly-created record, (2) add a file to an existing record, (3) replace an old file in an existing record with a new file, or (4) delete a file from an existing record.

To add a file to an Eligibility Document record, go into the Eligibility Document Edit Screen. To add a file to an existing record, click the Edit button. There is a new field called File with a Browse button to the right of it. Click Browse to locate and select the file on your computer or network. Its name should now appear in the File field. Continue to fill out or edit the other fields (e.g., Document Date, Expiration Date, Source) for the record. Click Save and then click Done.

When you return to the Read Only Screen, the document name will now have a hyperlink. To access the document, simply click on the hyperlink. Internet Explorer will ask whether you want to Open the file, Save it, or Cancel the request. To view the document, click Open. (Note that hyperlinks do not appear on the Edit Screen.)

Documents Tab

A new tab called Documents will be visible to users with the Document Upload permissions. Users can upload files that are not associated with Eligibility Documents – such as an insurance policy or apartment rental agreement – on this tab.

Up to 5 documents can be uploaded on this tab. With one exception, the upload process is the same as the above instructions. Users must enter a Document Name and Description in order to save the upload file to ARIES.

Since there is a limit to the number of documents ARIES allows, it is recommended that only information that is useful to multiple users be uploaded. OA strongly encourages uploading the ARIES Consent form, especially for share clients. **Because ARIES is not the database used for the administration of the AIDS Drug Assistance Program (ADAP), do not upload ADAP Enrollment forms into ARIES.**

For more detailed instructions on how to use this feature, press the F1 key while in ARIES and search for "document upload" in the ARIES Help Manual. If you would like to use the Document Upload feature, please have your manager or ARIES technical lead contact the ARIES Help Desk at 1-866-411-ARIES (2743).

Other Highlights

Referral Type Not Required: In November of last year, several new fields were added to the Referral data entry screen, allowing users to more accurately define and track the Referral (see [November 2014 ARIES Advisor](#)). For data consistency, the Referral Type field (previously called the Refer To field) was carried over from the old version of the screen to the new version of the screen. However, this old data element was *required* on the new version of the screen. For Release 27, that field is no longer required.

Import Samples Revised: More and more agencies are now using ARIES Import to transfer data from other systems into ARIES. Designing an import can be a daunting task, and while the import documentation has always been accurate and complete, many importers rely heavily on the Import Sample Files to provide an example of how to construct an import. In R27, these sample files have been revised to reflect all of the various data elements that can now be imported into ARIES. If your agency is interested in importing data, please see [ARIES Policy Notice G3](#).

Sortable Service Line Item List: The read-only Service Line Item screen which lists a client's services is now sortable. Click on any column header to sort the list based on that data element. You may choose from Date, Staff, Service, UOS, or Total. Clicking on a column heading *a second time* will sort the list based on that data element *in reverse order*. As new screens are added to ARIES and as existing screens are revised, we hope to add this sortable feature to other lists as well.

Updated Immunization List: Providers can track immunizations on the Medical History screen. Two immunizations have recently been added to the dropdown list: HPV (Human papillomavirus) and Twinrix, which protects patients from Hepatitis A and B. These data points will be incorporated into the forthcoming enhancement of the HIV/AIDS Bureau's Quality Management Reports in ARIES (see page 14).

New Windows Browser is an Unknown for ARIES

Microsoft recently announced that Windows 10 will become available at the end of July. As a part of that release, Microsoft will debut a new browser tentatively named *Edge*, which is intended to replace Internet Explorer. Although no one has seen the final version of Edge yet, the ARIES development team expects that it will not be fully compatible with the current version ARIES. Microsoft also announced that a version of Internet Explorer 11 will be included in Windows 10, but that it will not be the default browser, and may have certain features disabled.

What should ARIES users do? Please note that the use of ARIES is supported only on Internet Explorer versions 9 or 10, or the current full version of Internet Explorer 11. If you plan to buy new computers after July, try to get an earlier version of Windows with one of these browser versions. If you are planning to upgrade your computers, avoid moving to Windows 10. If you do end up with a computer that has Windows 10, configure it so that Internet Explorer 11 is your default browser; however, we cannot guarantee that ARIES will work flawlessly with this diminished version of Internet Explorer 11. Please also note that the ARIES Help Desk cannot assist you with problems related to Windows configuration. Contact your local IT department or your computer's manufacturer for such assistance.

What's Coming?

The ARIES Team is working on a number of projects and wants to keep you in the loop.

The HIV/AIDS Bureau (HAB) revised their [Performance Measure Portfolio](#) in November 2013. New measures have been added to the portfolio, while many former measures have been revised or “archived.” The ARIES Team is programming 21 of the 40 measures into the system. The HAB QM Report interface is being reconfigured to allow users to customize their QM reports. For example, users will be able to run the measures for their entire agency caseload or narrow measures to focus on a particular demographic group or service category. These features will be available in late summer.

The ARIES Team has also been working to understand HAB’s new “eligible scope” reporting requirement for the 2015 Ryan White Services Report (RSR). We have yet to determine how best to meet this requirement. You can expect to hear more about this later in the year. In the meantime, if you would like to track non-Ryan White funded services, please contact your Administrative Agency or the ARIES Help Desk to set up the contracts according to [ARIES Policy Notice D1](#).

Lastly, the ARIES Team has been discussing the possibility of importing client viral load lab results from California’s HIV Surveillance into ARIES. This would only be done for share clients who are already enrolled in ARIES. If implemented, this change will decrease providers’ data entry burden, while ensuring they have timely access to current lab data. You can expect to hear more from us about this later in the year.

The screenshot shows the ARIES website homepage. At the top, there is a navigation bar with links for Home, Programs, Services, Health Information, Certificates & Licenses, Publications & Forms, and Data. A search bar is located in the top right corner. The main content area is titled "Office of AIDS" and "ARIES Regional Information and Evaluation System (ARIES)". Below the title, there is a description of the system: "ARIES is a centralized HIV/AIDS client management system that allows for coordination of client services among medical care, treatment and support providers and provides comprehensive data for program reporting and monitoring. ARIES is used by Ryan White-funded service providers to automate, plan, manage, and report on client data." A section titled "Resources for Providers" lists several links: ARIES Help Desk, Forms, Newsletters, Policy notices, Training, Programs using ARIES, and Resources/supporting documentation. There is also a section titled "About this Program" which states: "The ARIES project is a collaborative effort between the California Department of Public Health, Office of AIDS (OA); the Texas Department of State Health Services; the County of San Bernardino, Department of Public Health; and the San Diego County, Office of AIDS Coordination. If you are a California Ryan White grantee or HIV/AIDS provider and would like additional information, contact [Karl Halfman](#) with OA's Care Research and Evaluation Section." A link for "Office of AIDS Home" is provided at the bottom of the page.